SHAREPOINT INSTRUCTIONS

Black Infant Health Program

Instructions for BIH SharePoint Access and Use

Overview

The California Department of Public Health (CDPH), Maternal Child Adolescent Health (MCAH) Division utilizes and hosts a SharePoint Site for the Black Infant Health Program.

This document serves as a general guide for establishing a CDPH SharePoint account and password, and accessing BIH SharePoint Site

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Instructions for BIH SharePoint Access and Use

Purpose and Overview

- SharePoint is an online tool that provides a central location to submit and access documents.
- BIH Agencies will use the BIH SharePoint Site hosted on the MCAH Extranet to submit their quarterly and annual reports, as well as a BIH programmatic and data resource center.
- To use the BIH SharePoint site you will need:
    - Internet Explorer and the Windows operating system.
    - A CDPH SharePoint Portal User Name and password (provided by MCAH).

SharePoint Trouble Shooting

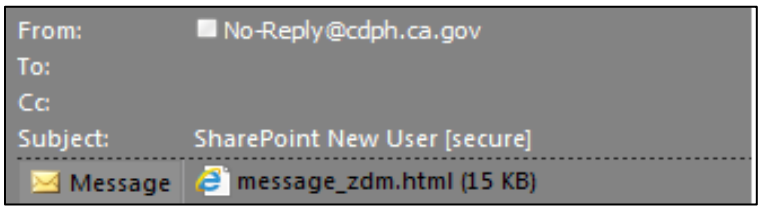
- Users can use the link below to reset or change their CDPH password. Links to reset your password after a lock-out or to reset an expired password are available on the CDPH Extranet Information website under Important Links (you will need your security question and answer which you will establish in step 5 of creating your MCAH Extranet account).

  https://selfservice.cdph.ca.gov

- If the information found on the above website is not sufficient to reset your password contact your Program Consultant.
- Contact your Program Consultant if you need additional assistance accessing or using the BIH SharePoint site.

Creating MCAH SharePoint Account

- You will receive an encrypted email from No-Reply@cdph.ca.gov, click on the attachment message_zdm.html
- If you do not have a Microsoft Encryption Account you will be asked to set one up.
    - Link to setup encryption account http://www.voltage.com/vsn/vsn-zdm-demo.htm

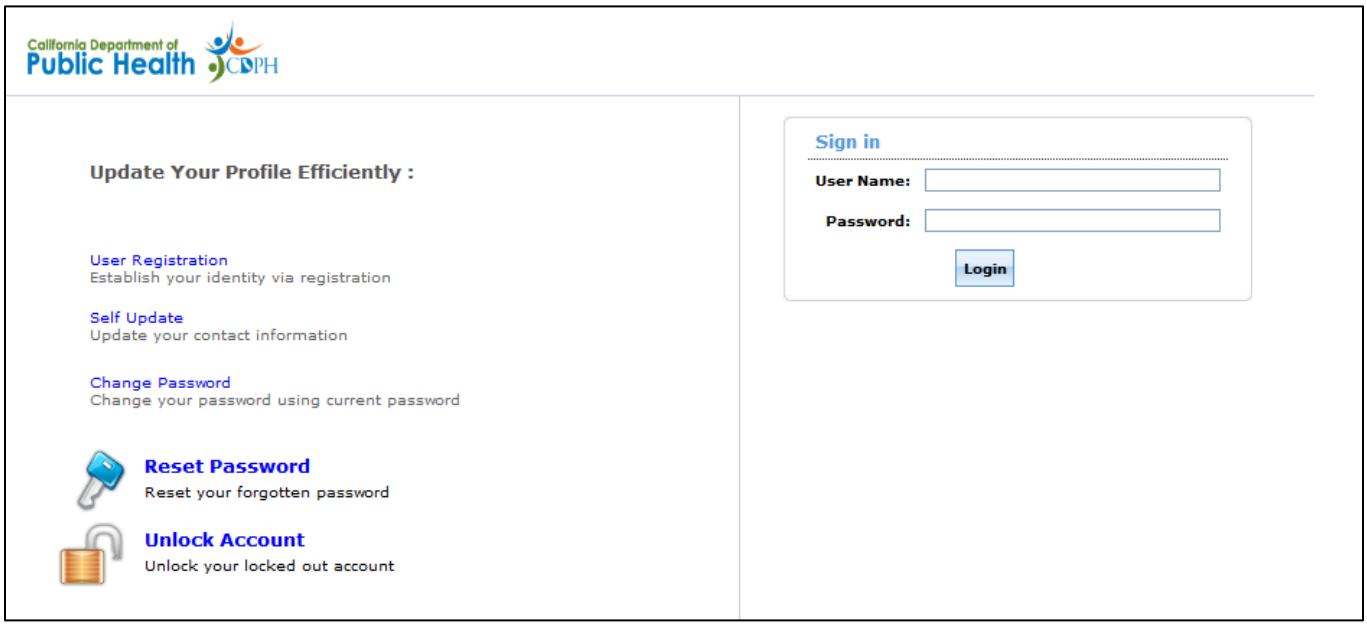


- Once your Microsoft Encryption Account is setup you will be able to retrieve your encrypted email which contains your new **User Name** and **Temporary Password**.

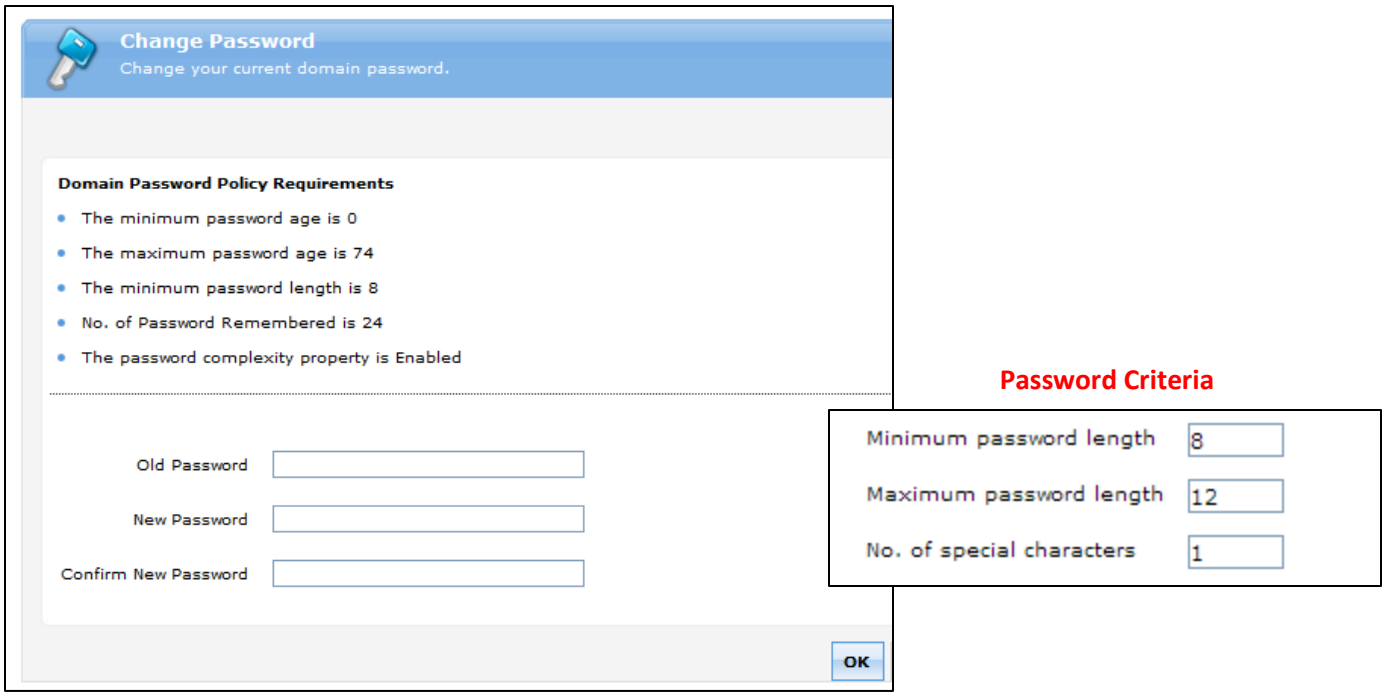
- You will need to register your account before you login into the BIH SharePoint site.
- Follow the link from your email or use the following link to register your account:

  https://selfservice.cdph.ca.gov/showLogin.cc

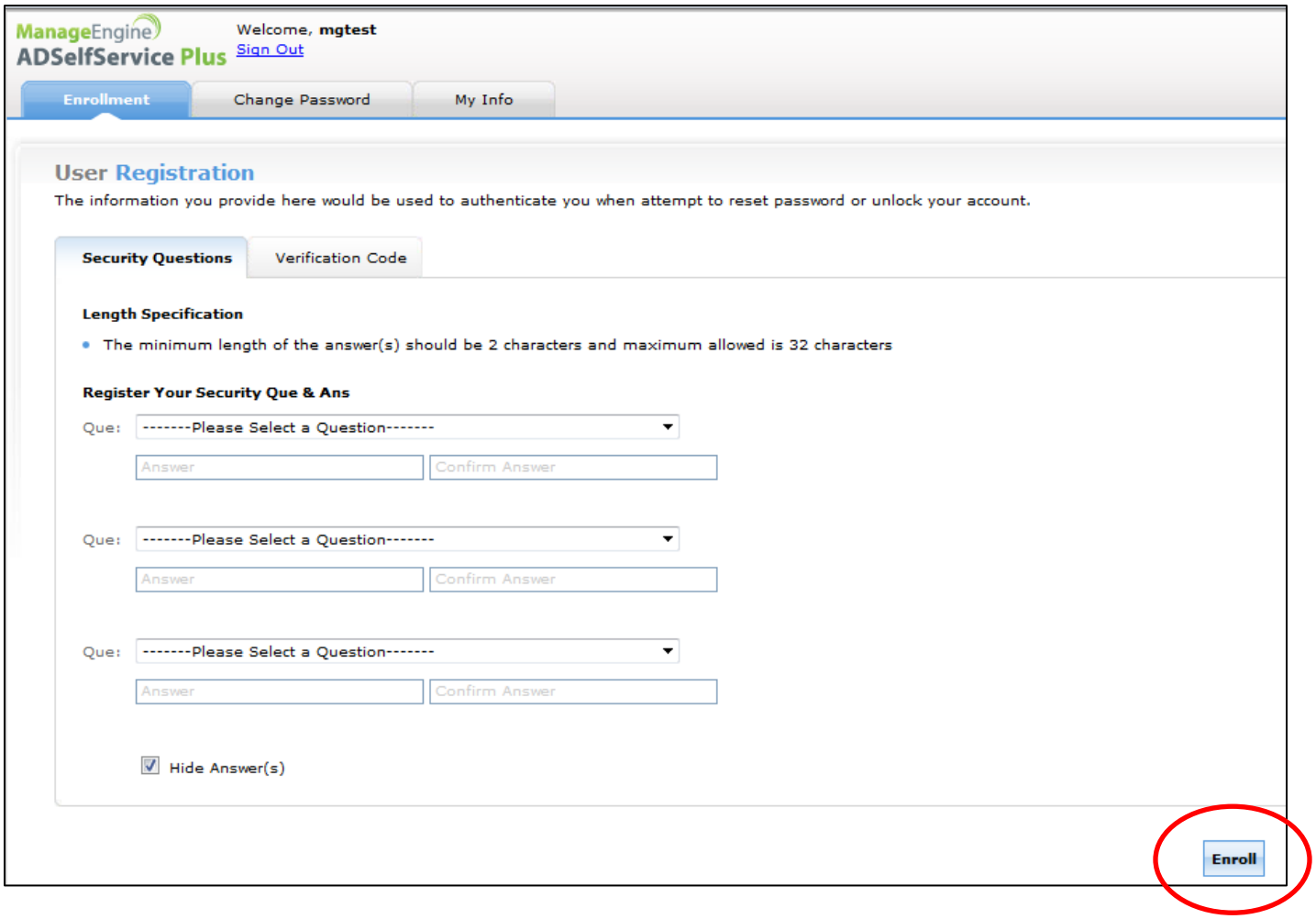
- Enter your **User Name** and **Temporary Password** to start the registration process



- Once logged in you will need to set your new password.



- After the password is changed you will be prompted to setup security questions:



- Click Enroll
- After you are registered you will be able to use the CDPH Self-Service site to reset or change your password by answering the security questions you setup or by a verification code through email.

Gaining Access to the BIH SharePoint Site

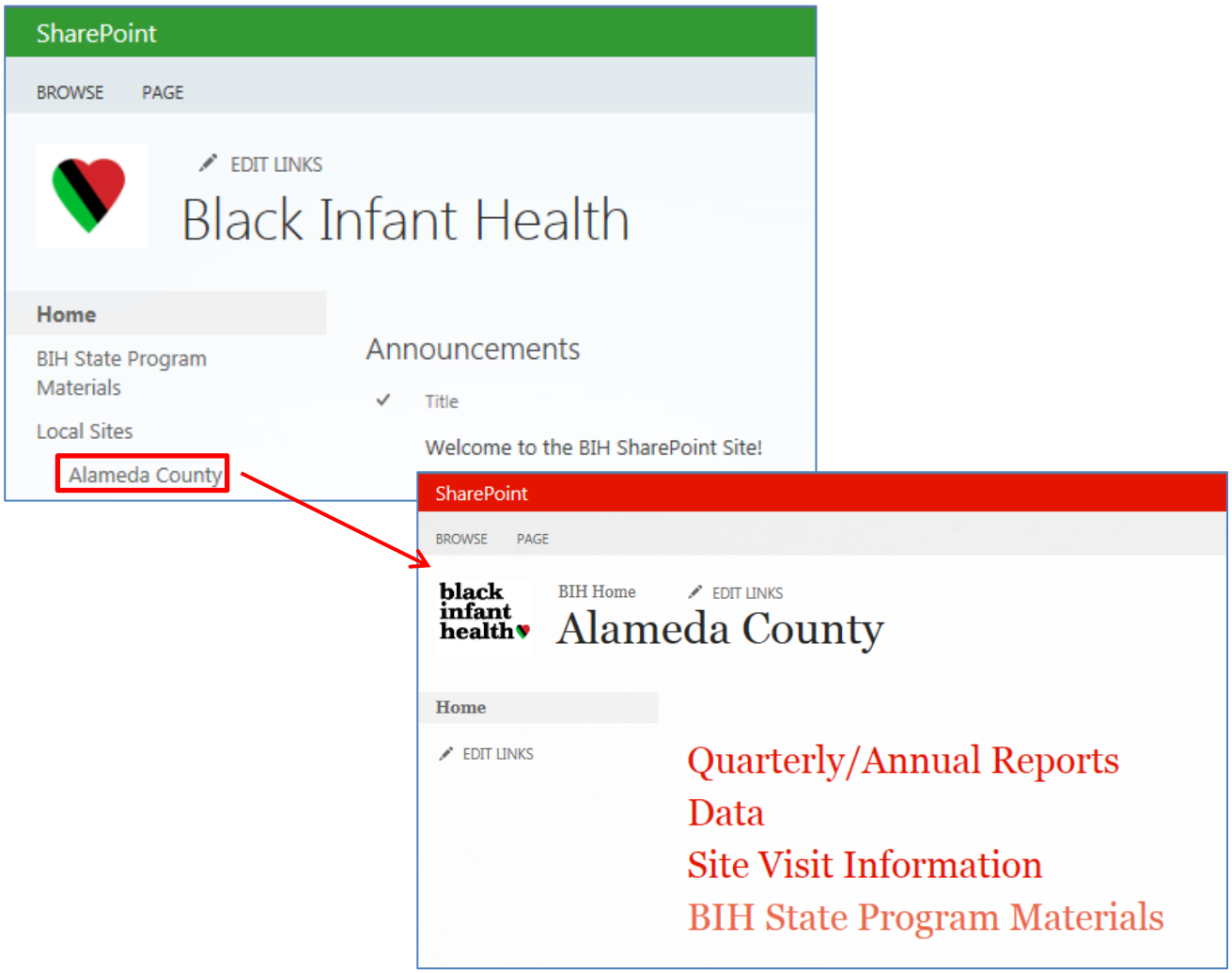
- Access the BIH SharePoint at:

  https://partners.cdph.ca.gov/sites/BIHTeamSite/Local

- Enter your **User name** and **Password** to gain access to the BIH site.
- It may be useful to bookmark the website.
- Resources are available by clicking the **BIH State Program Materials** link on the left side of the page.

Navigating the BIH SharePoint Site

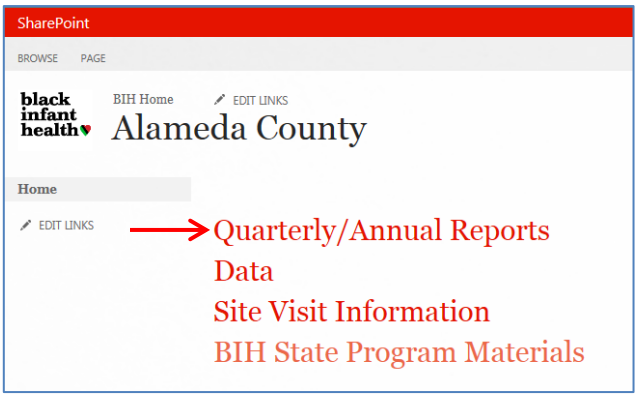
- The BIH SharePoint site will open to a home page. On this page you will find:
  - A link to your individual agency BIH site,
    - *Note: Agencies only have access their own BIH site.*
  - A place for BIH program announcements, program resources, and documents.
- Locate your site page in the left-hand menu, listed by County Name. Click the link with your site's name to access your page.



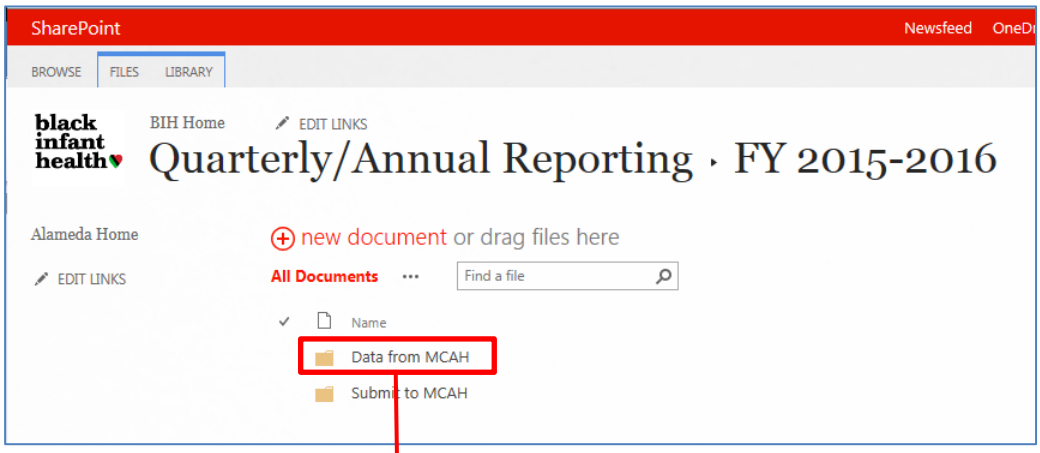
- On your site's home page there are links to:
  - **Quarterly/Annual Reports**
  - **Data**
  - **Site Visit Information**
  - **BIH State Program Materials**

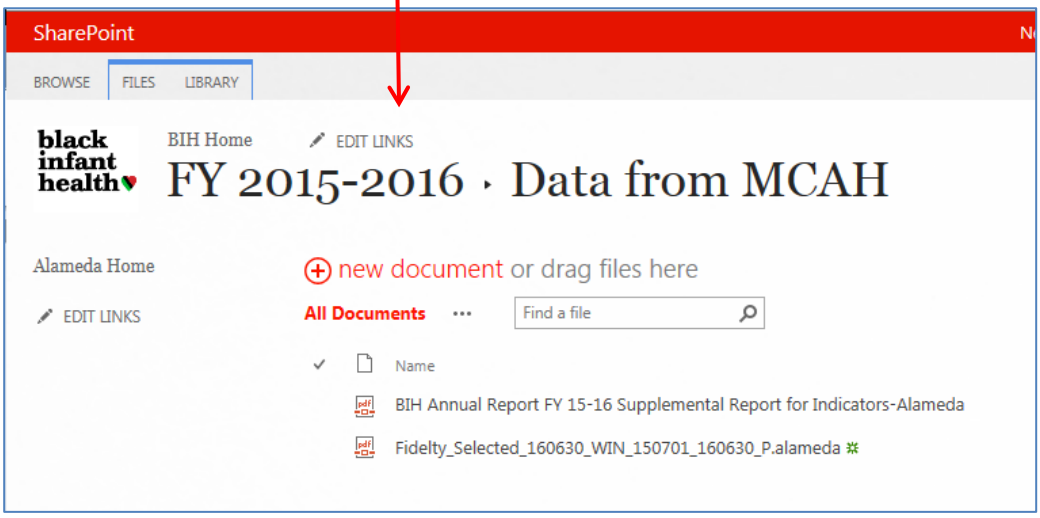
Quarterly/Annual Reports:

This library serves as a centralized location to submit BIH Quarterly and Annual Reports to MCAH.



- This library contains folders for each fiscal year
- Each fiscal year folder contains two folders
  1. **Data from MCAH** – this folder contains any data needed to complete the BIH annual report.
  2. **Submit to MCAH** – BIH quarterly and annual report for each fiscal year will be uploaded into this folders; document submission instruction are on **pg.8**.

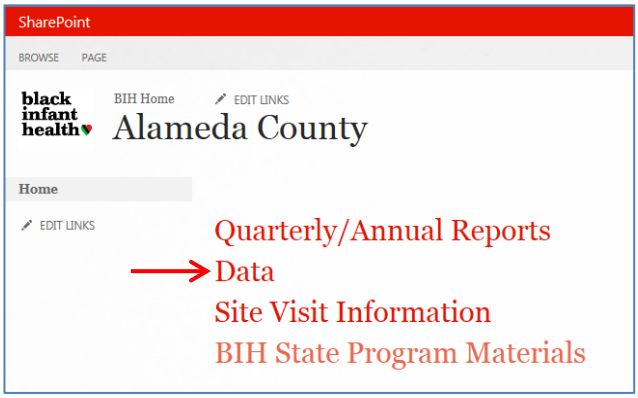




Data:

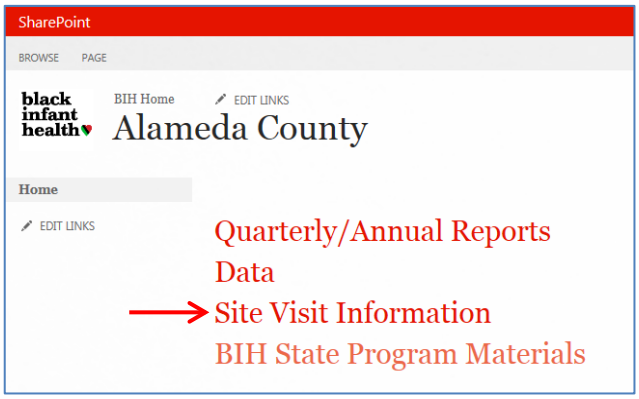
This library contains site-specific BIH data; e.g., fidelity monitoring reports.

Any site-specific data, program-related or surveillance, are housed in this folder.



Site Visit Information:

This library contains information regarding Site Visits conducted by MCAH, such as, guidance and instructions prior to any site visits, and any findings from MCAH.



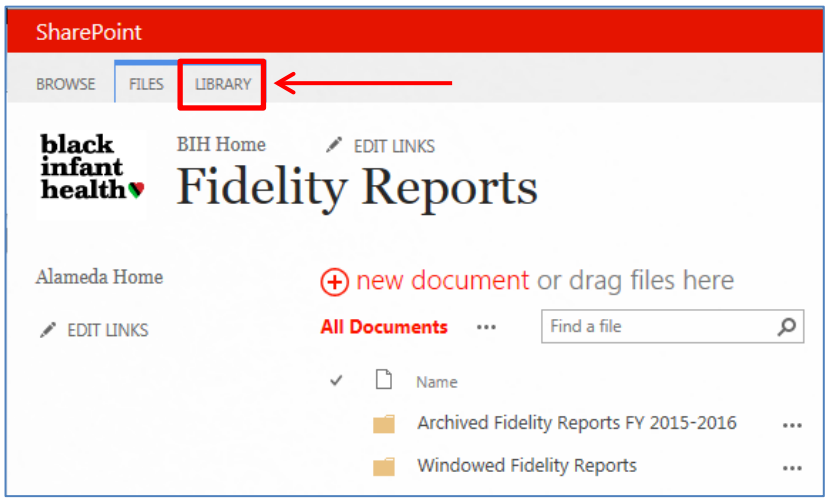
SharePoint Alerts

SharePoint alerts are email notifications that are sent by SharePoint when something changes in a library, e.g., a new document is uploaded.

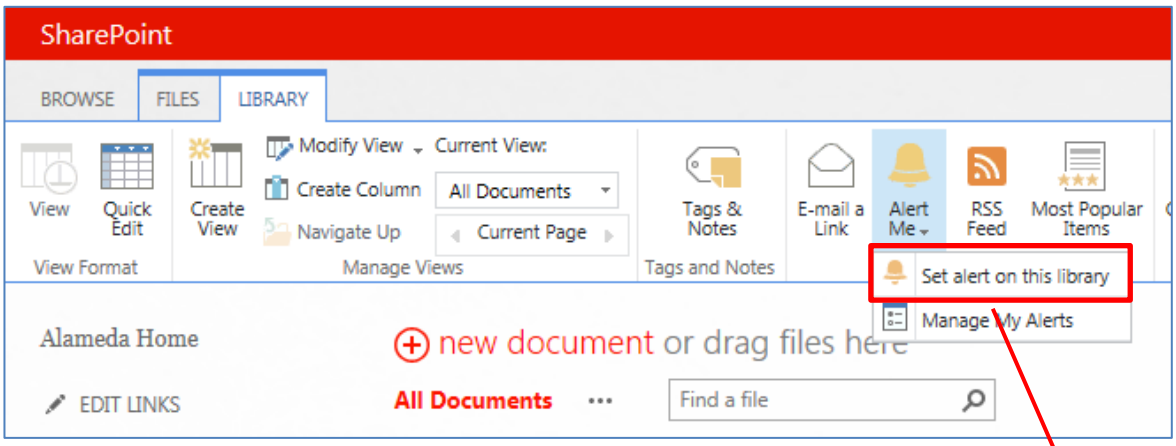
How to create SharePoint alerts on the list or document library

Navigate to the list or library you want to set an alert for (e.g., Fidelity Report Library).

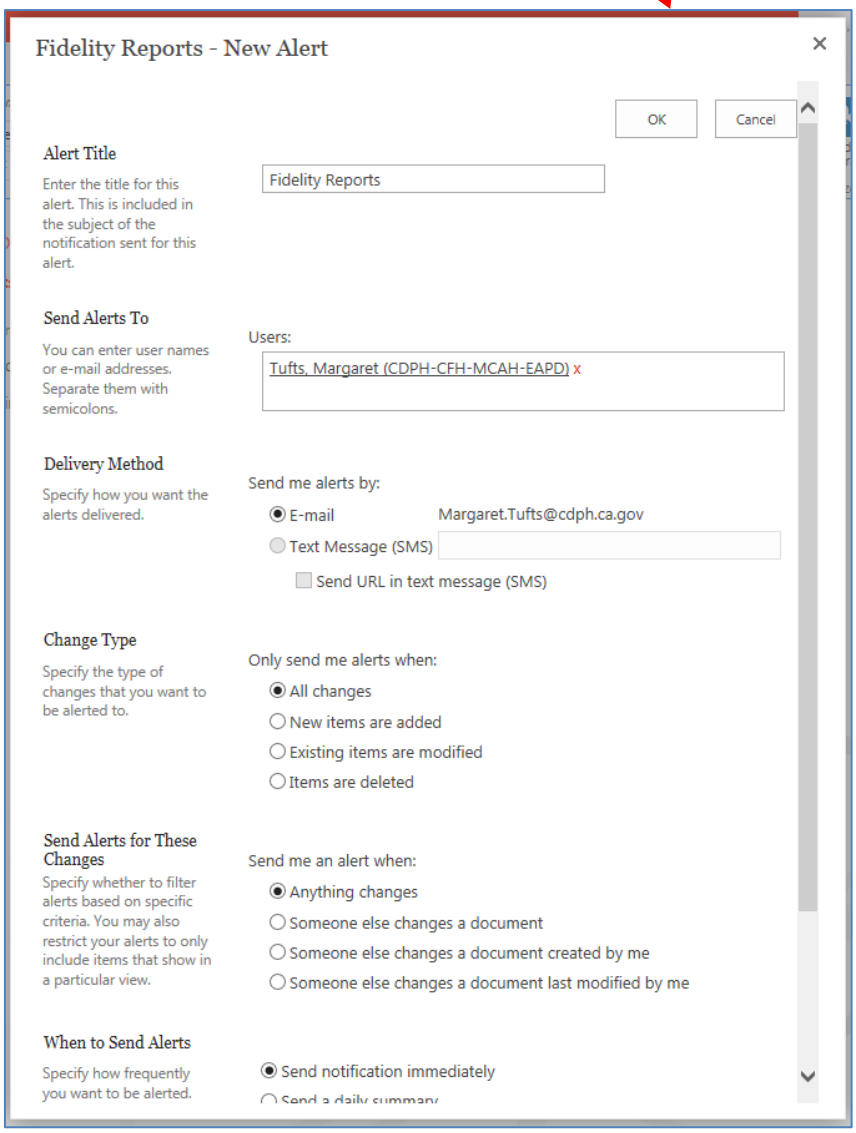
- From the top ribbon, click on Library Tab:



- Click **Alert Me -->** Select **Set alert on the library**

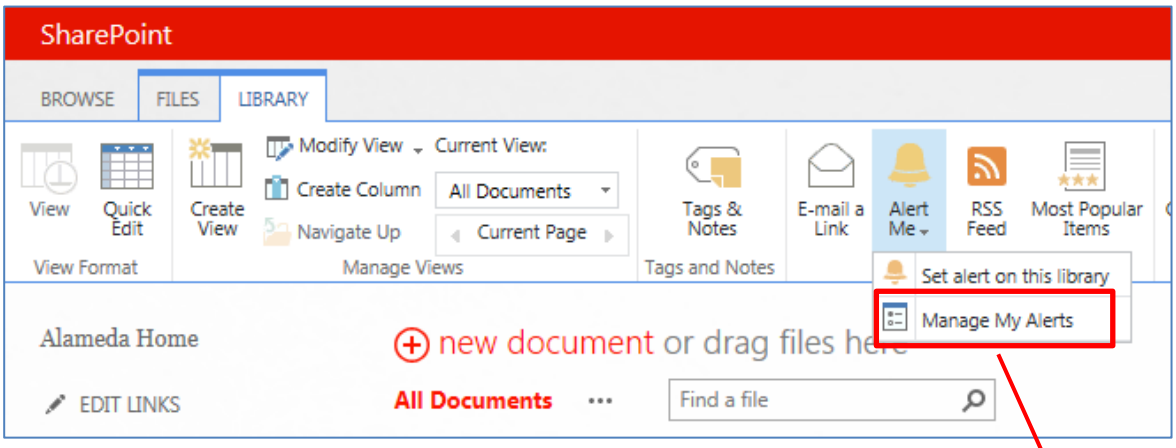


- This screen pops up, where you setup all the characteristics of the alert you are setting up:
- **Alert Title:** name your alert; whatever the name you give here will appear in the subject and body of the alert email.
- **Send Alerts to**: pre-filled with your email address.
- **Delivery method**: default is E-mail, leave as is.
- **Change Type**: specify what kind of behavior should trigger an alert.
- **Send alerts for these changes**: This is where you can filter the alerts even further for editable documents, e.g., word documents, and be alerted if anything in the document changes.
- **When to Send Alerts**: This is where you set the frequency. If you want an alert to be sent immediately or once a day/week – check off appropriate radio button.

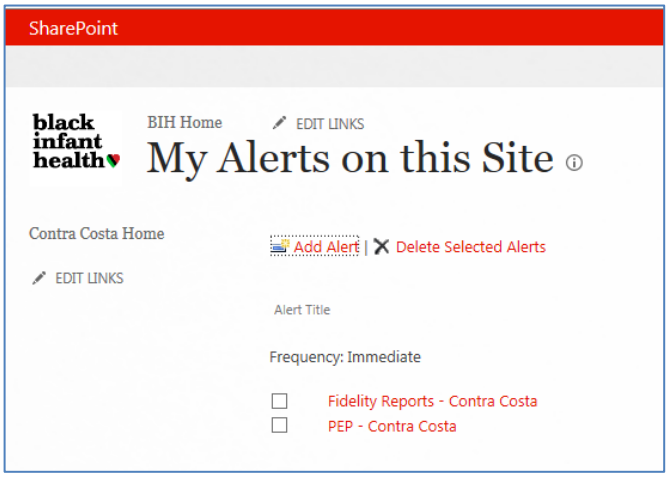


How to edit SharePoint alerts on the list or document library

Navigate to the ribbon as if you are setting up new alert, and select **Manage My Alerts** option.

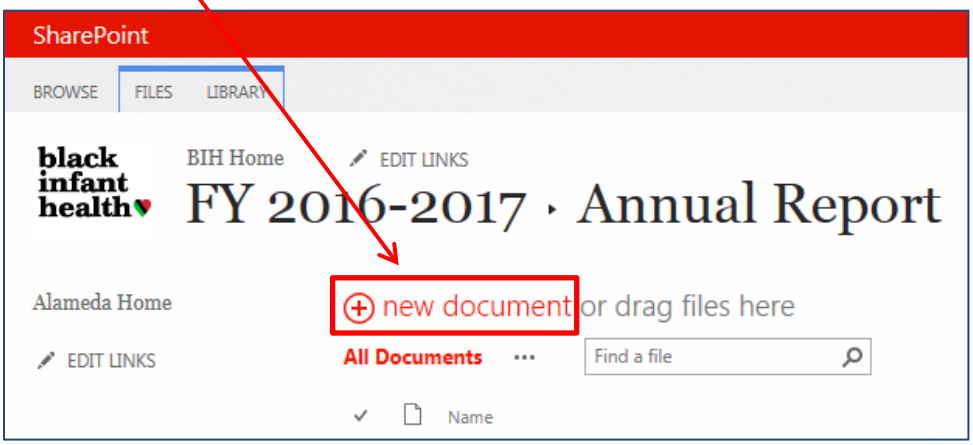


- Click on the name of alert you want to modify or hit a checkbox next to it and click delete, if you no longer want to receive notifications.

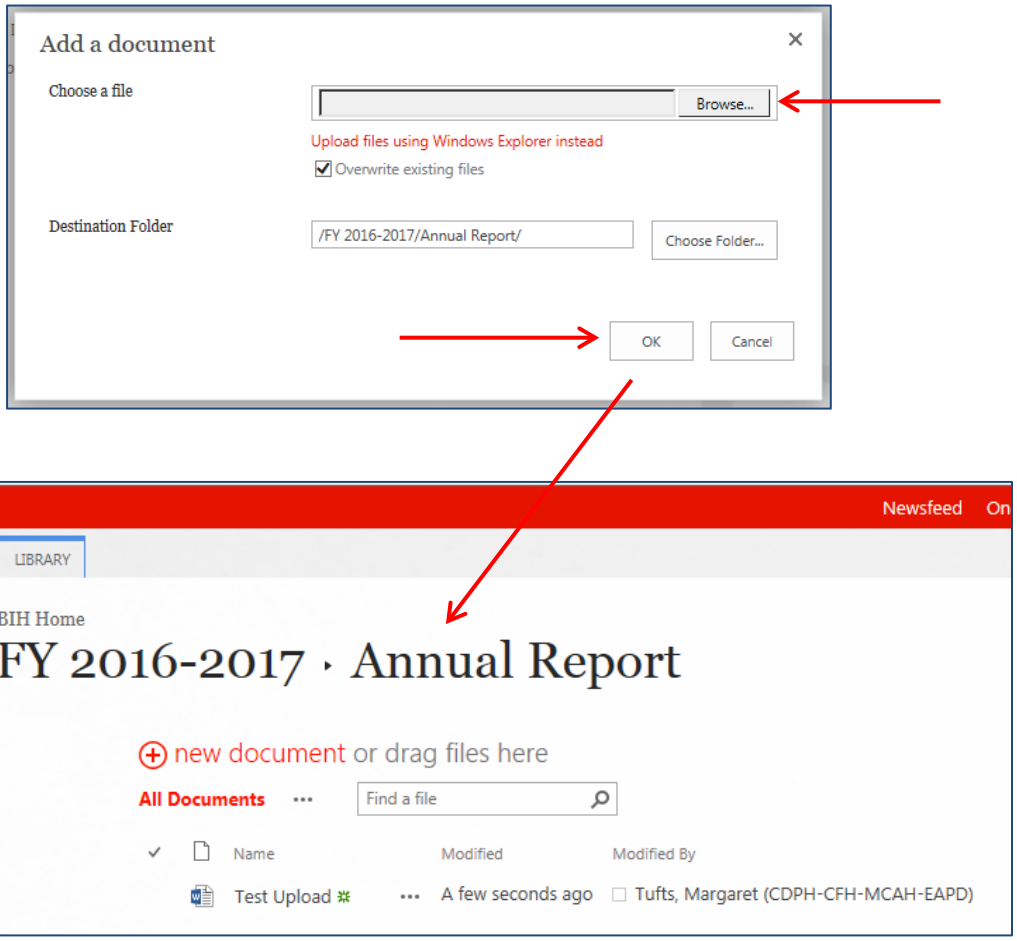


Uploading Documents into a SharePoint Library

- Navigate to the library you wish to add documents to, e.g., Annual Report.
- Select **New Document**

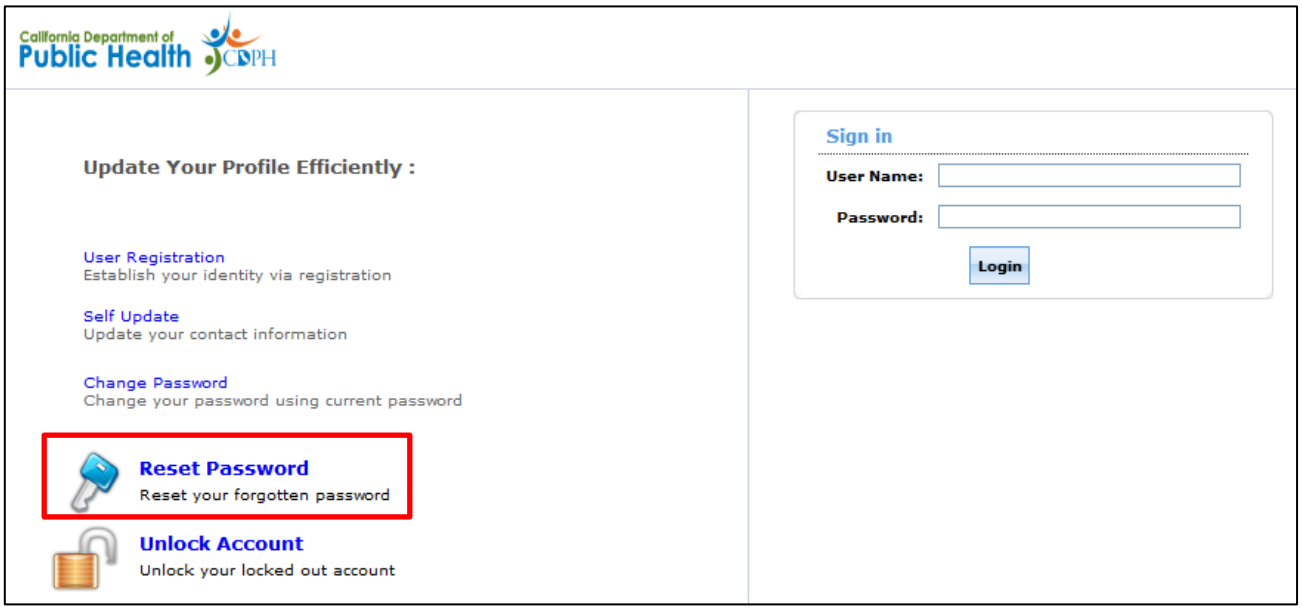


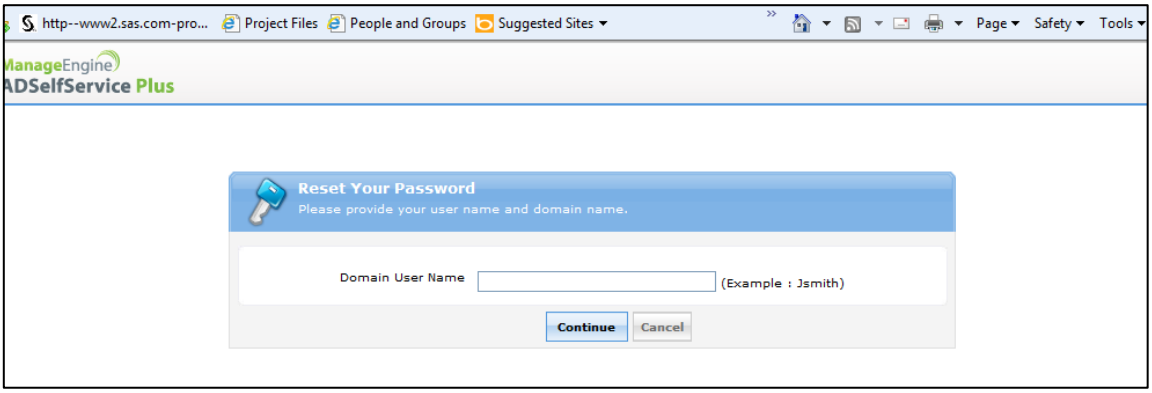
- A dialogue box will open where you can select the file from your local drive to upload to SharePoint.
- Select **Browse** to locate the file, once you've selected the file or files to upload, click **OK**.



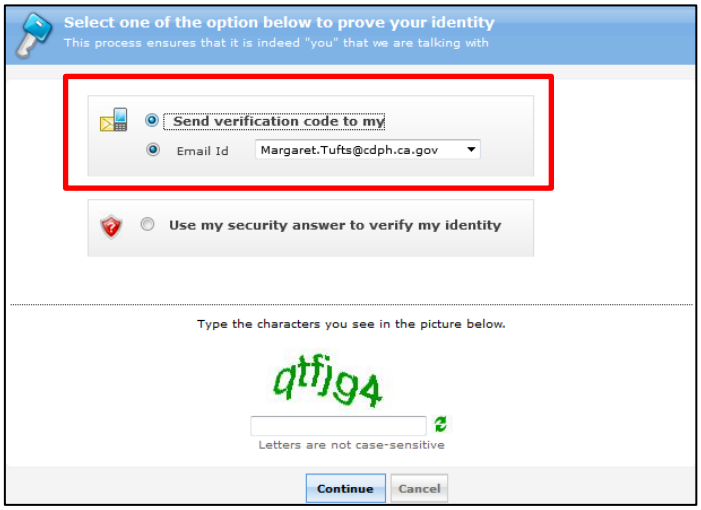
Resetting SharePoint Password

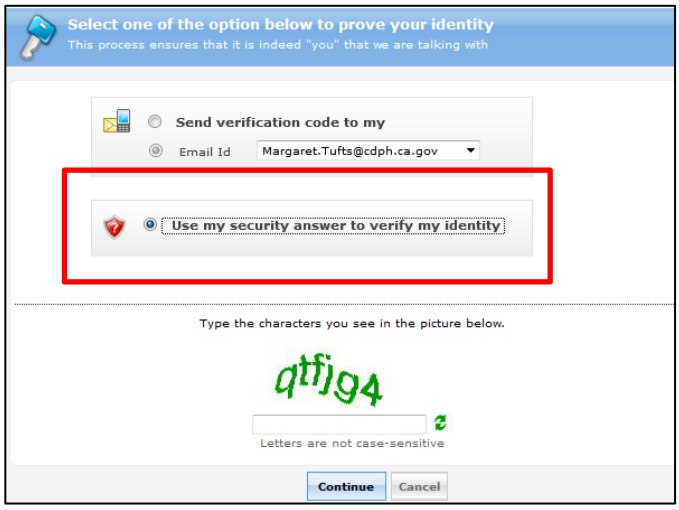
- Go to CDPH Self-Service site: **https://selfservice.cdph.ca.gov/showLogin.cc**
- Click Reset Password and then enter in your **User Name** on the next screen





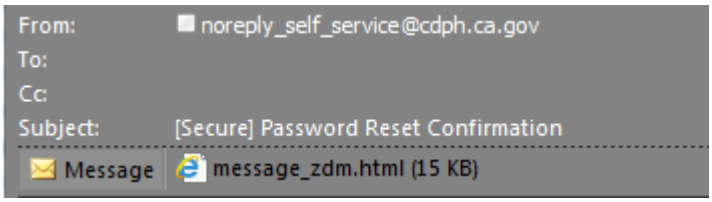
- You will then have two options to reset your password:
  - Verification code
  - 2. Answer security questions



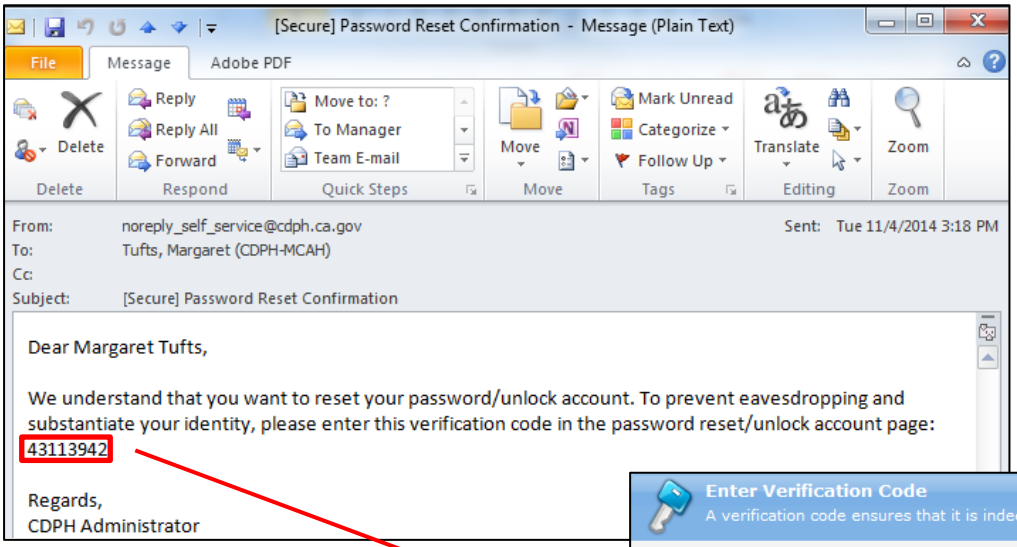


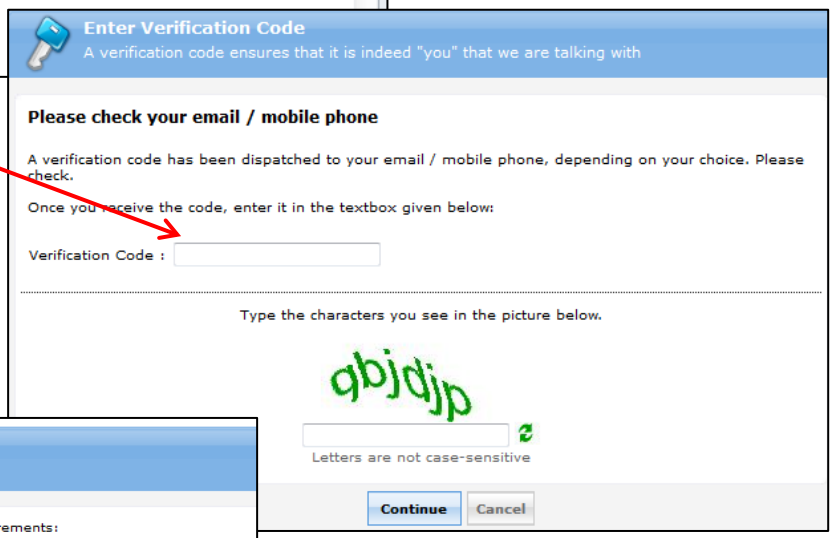
Resetting SharePoint Password – Verification Code

- You will receive an email from **noreply_self_service@cdph.ca.gov**

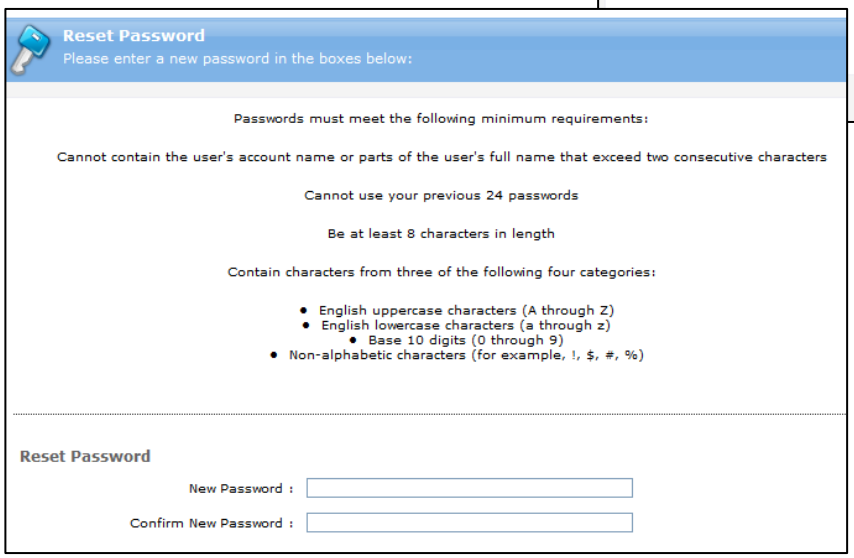


- Open the attachment in the encrypted email (message_zdm.html)
- Login with your Microsoft Encryption account
- Copy the verification code from the email to the CDPH Self-Service site



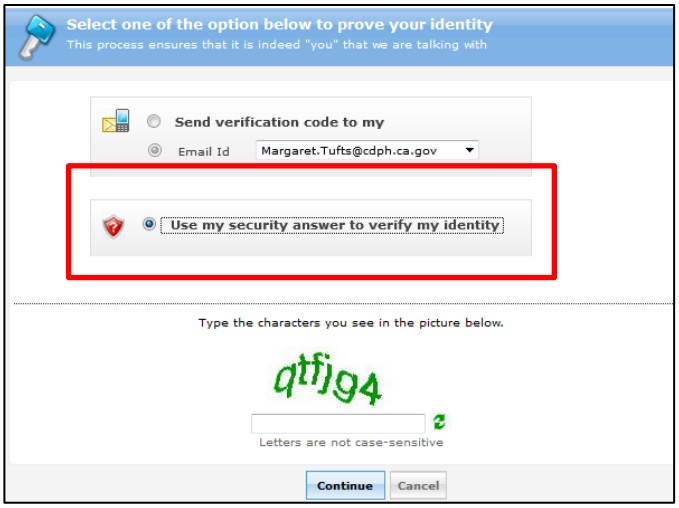


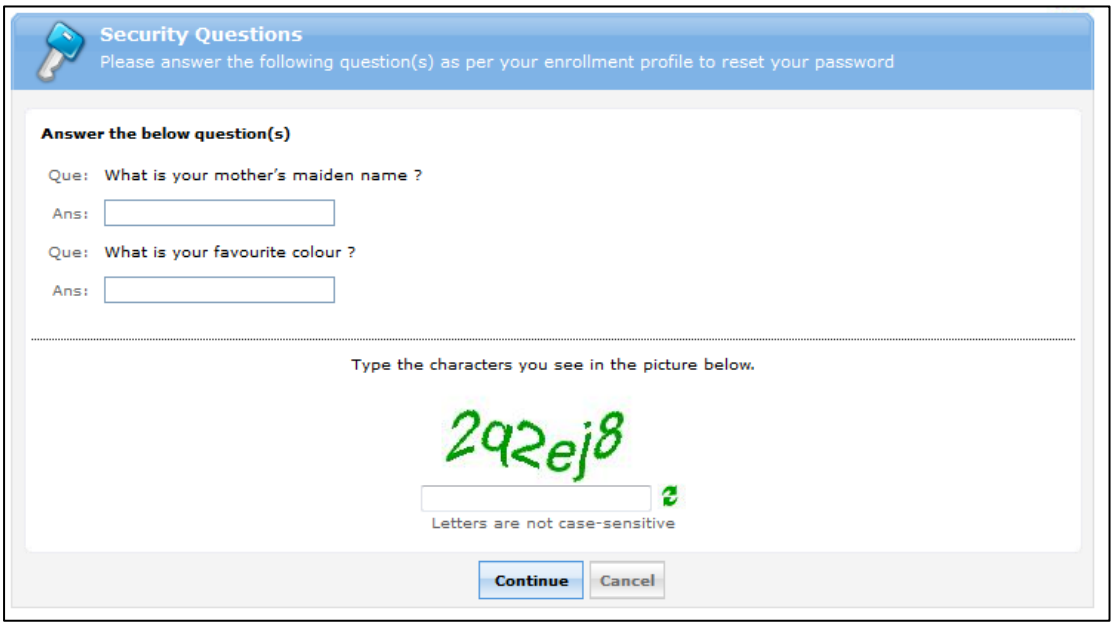
- You will then be prompted to create a new password



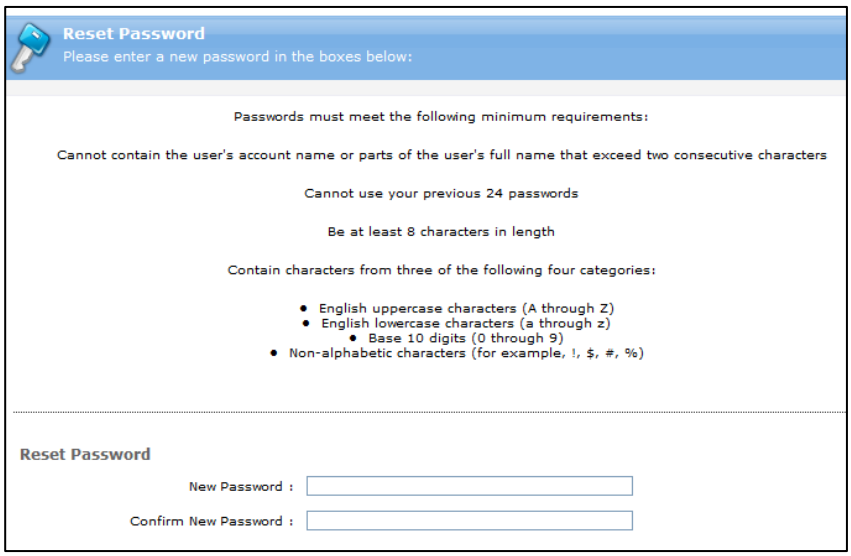
Resetting SharePoint Password – Security Questions

- You will be asked to answer your security questions that you setup during registration





- Once you answered your security questions correctly then you will be prompted to setup your new password



- After you have completed resetting your password access the BIH website using your username and new password.

  https://partners.cdph.ca.gov/sites/BIHTeamSite/Local

- Contact your Program Consultant if you need any additional assistance accessing or using the BIH SharePoint site.